



**Enterprise Computing Solutions - Education Services**

## **TRAINING OFFERING**

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**You can reach us at:**

Arrow Enterprise Computing Solutions Ltd, Part 1st Floor, Suite 1D/1, Central House, Otley Road, Harrogate, HG3 1UG

Email: [educationteam.ecs.uk@arrow.com](mailto:educationteam.ecs.uk@arrow.com)  
Phone: 0870 251 1000



# IBM Planning Analytics: Analyze Data and Create Reports (V2.0.x)

CODE:	LENGTH:	PRICE:
J1357G	16 Hours	£755.00

## Description

**Contains** PDF course guide, as well as a lab environment where students can work through demonstrations and exercises at their own pace.

This course is designed to teach analysts how to use IBM Planning Analytics to analyze data to discover trends and exceptions, create and customize reports and templates, and contribute data to plans. Through a series of lectures and hands-on activities, you will learn how use Planning Analytics Workspace and Planning Analytics for Microsoft Excel to create analyses, enter data, create custom views and dashboards, and build formatted reports and forms.

## Objectives

Understanding IBM Planning Analytics data  
Creating books  
Creating and saving views  
Changing the way data is displayed  
Displaying specific members by using sets  
Adding calculations to views  
Highlighting exceptions by using conditional formatting  
Entering data  
Experimenting with data by using sandboxes  
Working with spreadsheets online by using websheets  
Formatting for reporting  
Exploring data by using visualizations  
Creating dashboards  
Examining performance by using scorecards  
Exporting data  
Introduction to IBM Planning Analytics for Microsoft Excel  
Exploring data in Planning Analytics for Microsoft Excel  
Create reports easily by using Quick Reports  
Expanding and formatting members by using Dynamic Reports  
Exploring TM1 functions  
Creating Custom Reports  
Entering Data in Planning Analytics for Microsoft Excel  
Simplify tasks by using action buttons  
Creating websheets

## Audience

Analysts

## Prerequisites

- Knowledge of your business requirements
- Basic knowledge of Microsoft Excel

## Programme

Understanding IBM Planning Analytics data  
Understanding models  
Understanding cubes  
Understanding dimensions  
Understanding views  
Understanding sets  
Creating books  
Creating books  
Adding content  
Creating new sheets  
Saving, closing, and opening views  
Creating and saving views  
Compare two views of the same cube  
Create new views  
Save a view  
Changing the way data is displayed  
Move and filter dimensions  
Show different levels of detail  
Create an asymmetric view  
Display cells as percentages  
Add top or bottom filters  
Show attributes for dimension members  
Displaying specific members by using sets  
Display existing sets  
Add, remove, and reorganize members in a set  
Find members by using searches and filters  
View attributes  
Save sets  
Edit a set  
Adding calculations to views  
Add summary calculations  
Add member calculations  
Remove and rename calculations  
Highlighting exceptions by using conditional formatting  
Apply conditional formatting  
Add an additional condition  
Entering data  
Distribute data to multiple cells by using data spreading  
Enter and hold data using quick commands  
Copy and paste and use calculations  
Add a comment to a cell  
Experimenting with data by using sandboxes  
Creating sandboxes  
Comparing sandboxes  
Committing data and deleting sandboxes  
Working with spreadsheets online by using websheets  
Find and add websheets to your book  
Explore websheets  
Formatting for reporting  
Creating a new view  
Formatting the view for reporting  
Exploring data by using visualizations  
Examine different visualizations  
Customize a visualization

Creating dashboards Adding and reusing objects Synchronizing objects Navigating the book and perform tasks by using buttons  
Changing the appearance of a view Hiding information Proven Practices for Dashboards  
Examining performance by using scorecards Reading scorecards Adding scorecards to a book  
Exporting data Exporting a view to Microsoft Excel Introduction to IBM Planning Analytics for Microsoft Excel Examining report types  
Exploring data in Planning Analytics for Microsoft Excel Connect to a system, and add an Exploration Display different dimension  
members Modify and save the view  
Create reports easily by using Quick Reports Convert an Exploration to a Quick Report Drag a view to add a Quick Report  
Synchronize reports by using cell referencing Change members on rows or columns Add columns or rows and apply styles Apply  
custom formatting  
Expanding and formatting members by using Dynamic Reports Create and explore a Dynamic Report Formatting the Dynamic  
Report Rebuild the Dynamic Report  
Exploring TM1 functions Examine the TM1 functions in a Dynamic Report Derive rows based on saved sets Derive rows based on  
MDX Create custom format definitions Create custom columns Add new sections and multiple Dynamic Reports to a single sheet  
Creating Custom Reports Create two custom reports Combine the two reports  
Entering Data in Planning Analytics for Microsoft Excel Entering data in cube viewer Entering data in Dynamic Reports Entering  
data in Explorations and Quick Reports Using Sandboxes to experiment with data  
Simplify tasks by using action buttons Enable action buttons Add an action button to navigate to another worksheet Edit an action  
button Create an action button that rebuilds a worksheet  
Creating worksheets Publish a worksheet Manage worksheets Add the worksheet to a Planning Analytics Workspace book

## Session Dates

On request. Please [Contact Us](#)

## Additional Information

[This training is also available as onsite training. Please contact us to find out more.](#)